SOQ 24-033 To Provide Senior Citizens Needs Assessment Survey

Jefferson Parish Government

A. Project Name and Advertisement Resolution Number:

Provide Senior Citizen Needs Assessment Survey (SOQ-24-033) Resolution No. 144736

B. Firm Name & Address:

Market Decisions LLC dba Market Decisions Research

511 Congress Street, Suite 801

Portland, ME 04101

C. Name, title, & contact information of Firm Representative, as defined in Section 2-926 of the Jefferson Parish Code of Ordinances, with at least five (5) years of experience in the applicable field required for this Project:

Patrick Madden President

pmadden@marketdecisions.com

207-767-6440 ext. 101

D. Address of principal office where Project work will be performed:

511 Congress St., Ste 801

Portland, ME 04101

E. **Is this submittal by a JOINT-VENTURE? Please check:**

YES _____ NO ✓_____

If marked "No" skip to Section H. If marked "Yes" complete Sections F-G.

F. If submittal is by JOINT-VENTURE, list the firms participating and outline specific areas of responsibility (including administrative, technical, and financial) for each firm. Please attach additional pages if necessary.

G. Has this JOINT-VENTURE previously worked together? Please check: YES _____   NO _____

H. List all subcontractors anticipated for this Project. Please note that <u>all subcontractors must submit a fully completed copy of this questionnaire</u>, applicable licenses, and any other information required by the advertisement. See Jefferson Parish Code of Ordinances, Sec. 2-928(a)(3). Please attach additional pages if necessary.

Name & Address:	Specialty:	Worked with Firm Before (Yes or No):
1. None		
2.		
3.		
4.		

I. Please specify the total number of support personnel that may assist in the completion of this Project:

  2

J. List any professionals that may assist in the completion of this Project. If necessary, please attach additional documentation that demonstrates the employment history and experience of the Firm's professionals that may assist in the completion of this Project (i.e. resume). Please attach additional pages if necessary.

PROFESSIONAL NO. 1

Name & Title:

Brian Robertson, PhD
Vice President of Research

Name of Firm with which associated:

Market Decisions Research

Description of job responsibilities:

Dr. Robertson provides overall technical leadership for Market Decisions Research projects, including research and survey design, sampling methodologies, data collection methods and analysis. He manages the most technically complex studies undertaken by the company. For this project, Dr. Robertson will serve as primary investigator. He will oversee survey development, data collection, and data analysis.

Years' experience with this Firm:

24

Education: Degree(s)/Year/Specialization:

PhD, Anthropology, University of Utah, Salt Lake City, UT BS,
Anthropology, University of Utah, Salt Lake City, UT

Other experience and qualifications relevant to the proposed Project:

Dr. Robertson has directed thousands of survey projects on health care, consumer, environmental and economic issues. His areas of expertise include overall research and survey design, sampling methodologies, project management, statistical analysis, reporting, and development of policy goals and objectives. He brings special expertise in complex sampling designs and data collection protocols including dual frame sampling and multi-mode data collection protocols. Dr. Robertson's resume is included in Attachment A.

PROFESSIONAL NO. 2

Name & Title:

Candace Walsh
Research Manager

Name of Firm with which associated:

Market Decisions Research

Description of job responsibilities:

Ms. Walsh leads research projects from client consultation though reporting and presentation, primarily for public sector clients. As project manager, Ms. Walsh will meet with Jefferson Parish to understand research goals, design the survey, manage the implementation and workflows, monitor and coordinate data collection activities, prepare reports and present results. Ms. Walsh is responsible for monitoring resources so that this project is completed on time and on budget.

Years' experience with this Firm:

5

Education: Degree(s)/Year/Specialization:

MA, Psychology, Boston University, Boston, MA

BA, Psychology, University of Maine at Farmington, Farmington, ME

Other experience and qualifications relevant to the proposed Project:

Ms. Walsh manages projects centered on behavioral health and rehabilitation. She leads all of MDR's vocational rehabilitation projects, which include Maine, Vermont, Massachusetts, North Dakota, and Nevada. She also serves as research manager and consultant for the Mental Health Statistical Improvement Process projects. Ms. Walsh is adept at every facet of project management, from survey design, analysis and reporting and everything in between. Her strength lies in creating compelling narratives from data, showcased through her insightful and comprehensive reports. Candace works closely with clients through all stages of a project. Ms. Walsh's resume is included in Attachment A.

PROFESSIONAL NO. 3

Name & Title:

John Charles
Research Director, Data Quality and Analytics

Name of Firm with which associated:

Market Decisions Research

Description of job responsibilities:

Mr. Charles will work closely with Dr. Robertson and Ms. Walsh to design sampling, data collection, analysis, and reporting activities. He will lead all analytical aspects of the work, including developing analytical plans, conducting data cleaning, verification, weighting, and analysis, and preparing reports and presentations.

Years' experience with this Firm:

9

Education: Degree(s)/Year/Specialization:

MS Statistics, University of Southern Maine, Portland, Maine BA Mathematics

University of Southern Maine, Portland, Maine

Other experience and qualifications relevant to the proposed Project:

Mr. Charles has extensive knowledge and experience in performing parametric and non-parametric statistical analysis, statistical modeling, predictive analytics, machine learning and big data analysis. He is skilled in the use of state-of-the-art data management and statistical analysis software including SPSS, R, SAS among others. Mr. Charles' resume can be found in Attachment A.

PROFESSIONAL NO. 4

Name & Title:

Katie Klinko
Research Analyst

Name of Firm with which associated:

Market Decisions Research

Description of job responsibilities:

Ms. Klinko will be involved in all aspects of the project from initial design though reporting and presentation. She will work closely with Dr. Robertson and Ms. Walsh to plan sampling, data collection, analysis, and reporting activities. Ms. Klinko will program the survey, develop and manage sample files, conduct data cleaning and verification, conduct analysis, and prepare reports and presentations.

Years' experience with this Firm:

1

Education: Degree(s)/Year/Specialization:

M.S. Economics, University of Maine

B.S. Economics, The Pennsylvania State University

B.A. International Politics, The Pennsylvania State University

Other experience and qualifications relevant to the proposed Project:

Ms. Klinko has a proven history of producing high-quality research that addresses multifaceted socioeconomic issues. Her prior research projects focused on gender-based differences in U.S. labor market outcomes due to childcare constraints and the impact of the COVID-19 pandemic's restrictions on Maine's labor force. With skills including statistical modeling, data analysis, and economic forecasting, Katie is committed to delivering innovative solutions that advance public health policy initiatives. Ms. Klinko's resume is included in Attachment A.

K. List all prior projects that best illustrate the Firm's qualifications relevant to this Project. Please include any and all work performed for Jefferson Parish. Please attach additional pages if necessary.

PROJECT NO. 1

Project Name, Location and Owner's contact information:	Description of Services Provided:
Utah Community Needs Assessment of Vulnerable Adults	MDR conducted a statewide needs assessment of vulnerable adults, defined as adults with disabilities and older adults age 65+, to identify various service needs of the population, access and barriers to receiving needed services. This work involved a mixed methods study including an online survey for vulnerable adults, a separate online survey of stakeholders who work with vulnerable adults in Utah, and focus groups and in-depth interviews with respondents who were interested in participating in further research
Length of Services Provided:	**Cost of Services Provided:**
2023-2024	$74,963

PROJECT NO. 2

Project Name, Location and Owner's contact information:	Description of Services Provided:
Maryland Nursing Home Survey	Since 2008, MDR has conducted an annual experience survey of family members of residents at 222 nursing homes throughout Maryland. Approximately 5,000 respondents complete the survey every year. MDR is responsible for developing the sample for the survey and data collection using a multi-mode mail and telephone survey protocol. MDR analyzes the data and produces research reports for the Maryland Health Care Commission as well as an individualized reports for each of Maryland's 222 nursing homes with a qualifying response rate.
Length of Services Provided:	**Cost of Services Provided:**
2008-2024	$300,000 (annually)

PROJECT NO. 3

Project Name, Location and Owner's contact information:	Description of Services Provided:
Connecticut Statewide Victims Needs Assessment	MDR worked with the Connecticut Office of Victim Services and an advisory committee of victim service providers/advocates to develop and conduct a general population crime victimization survey, follow-up in-depth interviews with crime victims, and focus groups with victim service providers. The results of this study was used to direct future spending of Connecticut's federal Victims of Crime Assistance (VOCA) funds. The goal of this effort is to characterize and quantify victimization in Connecticut and identify underserved populations (victims who don't report crime, minorities), unmet service and support needs, and how OVS can better serve the population.
Length of Services Provided:	**Cost of Services Provided:**
2021-2022	$169,599

PROJECT NO. 4

Project Name, Location and Owner's contact information:	Description of Services Provided:
Maine Shared Health Needs Assessment	MDR was contracted by the Maine Shared Community Health Needs Assessment to assist in the development, management, analysis, and reporting of this effort. The first phase of the project involved the analysis of more than 220 health indicators for the state, counties, public health districts, selected cities, and by specific demographics when available. Phase 2 of the project involved community outreach and engagement and included the following efforts: 17 County Forums, 9 Community Sponsored Events, and 1000 Oral Surveys with immigrants. Final CHNA reports were developed by MDR for the state, each county, and districts in the spring of 2022. All of the County, District, and State reports and additional information and data can be found on our web page: www.mainechna.org.
Length of Services Provided:	**Cost of Services Provided:**
2021-2022	$140,000

PROJECT NO. 5

Project Name, Location and Owner's contact information:	Description of Services Provided:
Vermont Health Household Health Insurance Survey	This research was conducted on behalf of the Vermont Department of Health to provide current, state-specific information about insurance coverage and health care access among Vermont residents. A total of 3,002 household interviews were conducted by telephone. Sampling relied on a dual framed RDD cell and listed landline design. MDR prepared a weighted data set and provided an analytical data compendium of survey results broken out by key geodemographic, coverage, and health access characteristics.
Length of Services Provided:	**Cost of Services Provided:**
2001-2024	$264,398 (annually)

PROJECT NO. 6

Project Name, Location and Owner's contact information:	Description of Services Provided:
Rhode Island Health Insurance Survey	This research was conducted on behalf of the HealthSource RI, the Rhode Island state health insurance exchange, and the Rhode Island Executive Office of Health and Human Services to provide current, state-specific information about insurance coverage and health care access among Rhode Island residents. A total of 3,256 household interviews were conducted by telephone and online. Sampling relied on a dual framed RDD cell and listed landline design. MDR prepared a weighted data set and provided an analytical data compendium of survey results broken out by key geodemographic, coverage, and health access characteristics.
Length of Services Provided:	**Cost of Services Provided:**
2015, 2016, 2018, 2020, 2022, 2024	$504,000 (annually)

PROJECT NO. 7

Project Name, Location and Owner's contact information:	Description of Services Provided:
Nevada Vocational Rehabilitation Consumer Experience Survey	MDR has conducted surveys of customers of Nevada VR to measure consumer experience, consumer satisfaction, and program quality since 2018. In 2023, 1,425 surveys were administered to customers of general VR, older individuals who are blind, and youth receiving pre-employment transition services. Data collection used a multi-mode methodology combining telephone and online. Deliverables included a comprehensive research report, a presentation to the Nevada State Rehabilitation council, and recommendations for program improvement.
Length of Services Provided:	**Cost of Services Provided:**
2018-2024	$82,773 (annually)

PROJECT NO. 8

Project Name, Location and Owner's contact information:	Description of Services Provided:
Vibrant ONE Mapping the Mental Health and Sub Use System of Care	The Vibrant ONE Accountable Health Community Partnership contracted with MDR to conduct focus groups and interviews with consumers and stakeholders engage in the behavioral healthcare system located in the Northeast Kingdom of Vermont to understand the process of navigating this system. MDR created process maps that plot the journey of consumers through the behavioral healthcare system from their own perspective and the perspective of stakeholders.
Length of Services Provided:	**Cost of Services Provided:**
2022-2023	$41,842

PROJECT NO. 9	
Project Name, Location and Owner's contact information:	**Description of Services Provided:**
United Hospital Fund Patient and Caregiver Surveys	MDR worked with the United Hospital Fund to evaluate resident and caregiver experiences with 10 skilled nursing homes in the state of New York. MDR implemented a multi-mode data collection methodology combining mailed surveys and reminders with prompt calling. MDR coordinated sample development with the nursing homes using telephone, email, and secure FTP file transfer. Surveys were tracked and scanned, and a final cleaned data set was developed. Individual reports were produced for each nursing home, and findings were presented to UHF.
Length of Services Provided:	**Cost of Services Provided:**
2020-2021	$69,978

PROJECT NO. 10	
Project Name, Location and Owner's contact information:	**Description of Services Provided:**
MaineHealth Carroll County CHNA	MDR conducted a CHNA for New Hampshire's Memorial Hospital to explore the health issues and needs of communities in Carroll County, NH. Using quantitative health data and qualitative stakeholder survey data, MDR developed a report discussing 150 quantitative indicators of county population health in addition to stakeholder perceptions of critical issues, resource availability and needs, and knowledge of health care infrastructure. MDR also developed brief summary reports and PowerPoint slides related to obesity and elder care to support community education and program engagement in these areas.
Length of Services Provided:	**Cost of Services Provided:**
2021-2022	$20,000

L. List all prior and/or on-going litigation between Firm and Jefferson Parish. Please attach additional pages if necessary.

Parties:		Status/Result of Case:
Plaintiff:	**Defendant:**	
1. Not applicable		

M. Use this space to provide any additional information or description of resources supporting Firm's qualifications for the proposed project.

MDR is a public policy research and evaluation firm based in Portland, Maine. Our work uses all in-house resources, including a call center, high-speed scanners for paper surveys, and sophisticated software for multi-mode data collection (online and telephone).

Founded in 1977, MDR completes more than 100,000 surveys and 75 projects each year and has served clients across the U.S. These projects range in scope from large-scale multi-mode surveys of more than 5,000 households, and multi-mode healthcare satisfaction surveys mailed to more than 45,000 individuals to qualitative interviews of a dozen program stakeholders.

MDR has collected and analyzed data to inform public policy topics for more than 20 years and has completed hundreds of assignments. For a company of our size, MDR is unique in our ability to collect data via a variety of means using in-house resources. We focus on technically robust data collection and analysis to ensure the data is accurate and that we and our clients get more insights from the data we collect.

N. To the best of my knowledge, the foregoing is an accurate statement of facts.

Signature: _____ Print Name: Patrick Madden

Title: President   Date: October 24, 2024

Attachment A: Resumes

MARKET DECISIONS	**Brian Robertson, PhD** **Vice President of Research**
Summary of Qualifications	Dr. Robertson has mastered an approach to research that is both technically exacting and creative. He is skilled at designing methodologies for complex projects. He designs and oversees rigorous research studies that address health care and public policy issues. Dr. Robertson provides overall technical leadership for Market Decisions Research projects, including research and survey design, sampling methodologies, data collection methods and analysis. Since joining Market Decisions in 2000, he has managed some of the most technically complex studies undertaken by the company. Dr. Robertson's more than 35 years of public policy research and evaluation experience includes a university-based survey research center and in the private sector. He has directed thousands of survey projects on health care, consumer, environmental and economic issues. His areas of expertise include overall research and survey design, sampling methodologies, project management, statistical analysis, reporting, and development of policy goals and objectives. He brings special expertise in complex sampling designs and data collection protocols including dual frame sampling and multi-mode data collection protocols.
Education	PhD, Anthropology, University of Utah, Salt Lake City, UT BS, Anthropology, University of Utah, Salt Lake City, UT
Contributions to Science	**State of Maine State Public Health Systems (SPHS) Assessment.** Dr. Robertson participated in the 2021 Assessment of SPHS Essential Service 9: Evaluate Effectiveness, Accessibility, and Quality of Personal and Population-Based Health Services which include: • Evaluation and critical review of health programs, services, and systems to determine program effectiveness and to provide information necessary for allocating resources and reshaping programs for improved efficiency, effectiveness, and quality. • Assessment of and quality improvement in the state public health system's State Public Health System's performance and capacity. The goal of the assessment is to look at the function of the entire public health system by looking at the Ten Essential Public Health Services. The assessment helps state system partners identify the components, competencies, and capacities of their state's public health system, identify which partner organizations provide which services within our state, and then assess how the system is working. A set of standards describes an optimal level of performance and capacity to which all public health systems should aspire. Participants rate the performance of the public health system on these standards. The standards stimulate continuous quality improvement by serving as a guide for learning about activities throughout the system and determining how to make improvements. Identification of system strengths

and weaknesses is then used to improve and better coordinate public health activities throughout the state. Most importantly, the results may inform policy and resource decisions leading to an improved public health system.

Health Benefits Exchange Survey Design

Dr. Robertson served as a member of an expert panel convened by Research Support Services and the Center for Survey Research, University of Massachusetts, Boston. The panel reviewed existing surveys and determined the applicability of questions for a survey of consumers enrolling in health plans through state and federal exchanges. The work was conducted for the US Census Bureau.

Measuring Consumer Experience with Vocational Rehabilitation Agencies

To more effectively measure the experience of consumers, Dr. Robertson developed a consumer experience methodology designed to provide a greater insight into the experience of consumers, especially those receiving services through government agencies.

Rather than using the traditional method relying on customer satisfaction surveys, Dr. Robertson developed a methodology that effectively measures the entirety of the consumer experience. The methodology relies on set questions that have been tested and validated though thousands of surveys that measure aspects of the consumer experience based on what consumers see as important to their experience. The survey includes:

- Process measures (what is being provided and how is it provided)
- Performance measures allowing consumers to rate their experience and also allowing agencies to track their performance over time.
- Outcome measures which assess how consumer view the effectiveness, usefulness, and value of the services provided
- Quality improvement measures which identify problems and areas for improving the consumer experience.

The performance measures are used to create the VR consumer experience core metrics which summarize how positively consumers rate their experience with the agency and the services received. The methodology has been used to assess consumer experience with VR agencies in eight states and is currently being used on an ongoing basis by VR agencies in Florida, Nevada, and North Dakota.

Health Insurance Surveys

In 2001, Dr. Robertson developed a proprietary health insurance survey design to collect complex health insurance and healthcare access information from all members of individual households. The survey included modules of questions on specific topics, allowing clients to tailor the survey to their specific needs. It was used in Vermont for eight health insurance studies reaching more than 30,000 respondents. These projects provided data used in the design of programs that lowered the rate of uninsured to just 4% by 2014. This approach has been used in more than 25 studies in eight

states, gathering data on more than 150,000 households.

Patient Experience Survey, State Innovation Model Grant for Health Care, Maine

Dr. Robertson worked with clients and stakeholders in the state of Maine to develop a comprehensive patient experience survey. Clients indicated that standard patient experience surveys, including CAHPS, did not fully measure patient experiences with the health care system and did not provide detailed information to allow identification of areas for quality improvement.

This survey included key CAHPS measures and added questions about patient- provider communications, coordination and outcomes of care, use of healthcare services, fragmentation of care, and barriers to patients. One of the important design elements was to allow patients to provide written comments about changes or problems they experienced.

Health Insurance Exchange Survey

Dr. Robertson developed a research protocol and survey to measure awareness, familiarity, and experience with the exchange enrollment process. This survey also had a modular design, allowing clients to select specific topics. First used to assess the cutover experience with the Massachusetts Health Exchange in 2010, the survey and research protocols have been used in more than ten studies in six states.

Perceptual Mapping of Consumer Attitudes

Dr. Robertson used "perceptual mapping" with hospitals in New York, Connecticut, and Maine. These "mind maps" of consumer views on preference and usage led to dramatic changes in communication priorities.

Additional Experience	Dr. Robertson began his career in research at the University of Utah Survey Research Center where he served for ten years, as a research analyst then as a project manager, and finally as Acting Manager. His private research experience includes five years as Vice President and Director of Research at Valley Research, Salt Lake City, Utah.
Professional Associations	Dr. Robertson is an active member of the American Association for Public Opinion Research and Vice president/President elect of the New England Chapter of the American Association for Public Opinion Research.
Recent Publications	*Experiences Using Customer Satisfaction Measurement to Improve Service Quality in Florida, Vermont, and North Dakota*. Presented at Annual Summit on Performance Management in Vocational Rehabilitation, February 2017.

Measuring Underinsurance: Challenges and Implications Under the ACA. Presented at the American Association for Public Opinion Research Annual Meeting, May 2017.

Can Survey Design Reduce the Undercount of Public Health Insurance Coverage? Presented at the American Association for Public Opinion Research Annual Meeting, May 2018.

Identifying Gender Minorities in Population-based Proxy Surveys. Presented at |

the American Association for Public Opinion Research Annual Meeting, May 2018.

Is It Worth the Cost? The Use of a Survey Invitation Letter to Increase Response to an Email Survey. Presented at the American Association for Public Opinion Research Annual Meeting, May 2018.

Consumer Experience: Turning Consumer Satisfaction into Quality Improvement. Presented at the Annual Summit on Performance Management Excellence, September 2018.

The Impact of the Affordable Care Act on Underinsurance Rates: Results from Four States. Presented at the American Public Health Association Annual Meeting, November 2018.

Improving survey representativeness in a low response rate environment using targeted monetary incentives. Presented at the American Association for Public Opinion Research Annual Meeting, May 2019.

Understanding Pre-ETS Populations: What to Ask and What to Know. Presented at the Annual Summit on Performance Management Excellence, September 2019.

Are advanced letters cost effective? The use of an advance letter to improve survey response to large scale telephone survey and reduce data collection costs. Presented at the American Association for Public Opinion Research Annual Meeting, June 2020.

The Impact of the COVID-19 Pandemic on Massachusetts Employers, Preliminary Findings from a Qualitative Supplement to the Massachusetts Employer Survey, Presented at the American Academy Health Annual Research Meeting, June 2021.

Surveying Low Incidence Race and Ethnic Minority Populations by Cell Phone. Presented at the American Association for Public Opinion Research Annual Meeting, May 2022.

MARKET DECISIONS	Candace Walsh, MA
	Research Manager
Summary of Qualifications	Candace began her career in community mental health assessing individuals in acute crisis. This experienced honed her communication style, enabling her to adapt to diverse audiences and effectively convey ideas to ensure optimal care for those unable to advocate for themselves. Her tenure as a crisis clinician in the non-profit sector sparked her interest in research and leveraging data to instigate change and help others. Joining MDR in 2019, Candace has seamlessly transitioned through various roles, from research assistant to research manager. Her meticulous attention to detail and innate curiosity drives her management of projects centered on behavioral health and rehabilitation. She leads all MDR's vocational rehabilitation projects, which includes Maine, Vermont, Massachusetts, North Dakota, and Nevada. She also serves as research manager and consultant for the Mental Health Statistical Improvement Process projects. Candace is adept at every facet of project management, from survey design, analysis and reporting and everything in between. Her strength lies in creating compelling narratives from data, showcased through her insightful and comprehensive reports. Candace works closely with clients through all stages of a project. Through her work at MDR, Candace has learned the importance of listening to the message beyond words and tactfully eliciting difficult information while maintaining empathy. She understands the value of using individual stories to gain an understanding about healthcare outcomes, access to care, and community needs.
Education	MA, Psychology, Boston University, Boston, MA BA, Psychology, University of Maine @ Farmington, Farmington, ME
Relevant Experience	**Vocational Rehabilitation Consumer Studies (2019-2024)** Research Assistant, Research Analyst, Project Manager. Candace has worked with various vocational rehabilitation agencies since she started at MDR, including Florida, Massachusetts, North Dakota, Nevada, Massachusetts, Maine and Vermont. Vocational rehabilitation consumer surveys are tools designed to gather feedback and insights from individuals who have participated in vocational rehabilitation programs. These surveys aim to assess the effectiveness of vocational rehabilitation services in helping individuals with disabilities achieve employment goals and enhance their overall quality of life. The feedback obtained from these surveys can be instrumental in improving and tailoring vocational rehabilitation programs to better meet the needs of participants. These surveys involved regular analysis and reporting with frequent client meetings. Data collection is multi-mode,

including oversampling.

Mental Health Statistical Improvement Program (2020-2024)

A multimode survey of adult mental health and substance abuse treatment recipients. Consumers who have accessed SAMHSA funded services within the past year are contacted and asked about their experiences accessing care, their general wellbeing, gaps in services, etc. Candace has worked on all MDR's MHSIP projects as both PM and consultant- she has assisted in survey designed and worked closely with clients to ensure all SAMHSA requirements are met. She works on the analysis and reporting for Uniform Reporting System (URS) tables, mandated reports each state must produce in order to gain funding for services.

Massachusetts Health Connector (2019-2024)

MDR worked with the Massachusetts Health Connector to conduct research among current and former enrollees of Health Connector insurance plans. Using an online survey with a mailed pre-notification letter, reminder letters, and target pre-incentives, MDR sampled members by enrollment status, subsidy category, single or family plan, and specific plan type. The survey is designed to collect feedback on several domains of the customer experience including satisfaction, plan choice factors, plan information, plan selection, use of the Health Connector platform and contacting Health Connector, financial assistance, the individual mandate, post-selection experience, dis-enrollee experience, health care plan quality, quality improvement, health and health care use, costs and barriers, internet access and demographics.

Community Health Needs Assessments (2020-2024)

Maine Community Foundation, ME Department of Health, Utah Department of Health, Agency on Aging, NH Department of Health, A Community Health Needs Assessment (CHNA) is a systematic process used to identify and analyze the health needs and priorities of a specific population or community and to gain a comprehensive understanding of the health issues and challenges faced by the community. Candace worked on survey design, project management, programming, and reporting. MDR contracts with evaluation firms to complete all aspects of the CHNA, which includes data collection, community engagement, identification of health disparities, resource mapping, prioritization of needs and development of an action plan. The findings from these assessments help guide healthcare organizations and policymakers in allocating resources and developing targeted interventions to improve the overall health and well-being of the community.

Tobacco Use and Cessation Research

Candace has been heavily involved in research on tobacco control and cessation, including research related to electronic nicotine delivery systems (ENDS) and vaping among youth and young adults. She has worked on projects to evaluate the implementation of Tobacco 21 in

both Massachusetts and Maryland. In addition to the evaluation of the T21 law, she contributed to manuscripts currently pending publication for both projects.

Olympia Snowe Women's Leadership Institute

The mission of the Olympia Snows Women's Leadership Institute is to raise the confidence and aspirations of high school girls by helping them develop the skills required to be leaders in their lives, families, careers and communities. MDR analyzes and reports on the results of the baseline and year end surveys completed by the participants in the program, data that is used to inform budgetary and doner decisions. Candace served as analyst and managed analysis, reporting, and presenting the outcomes of these surveys.

Additional Experience	Candace began her career in community mental health assessing individuals in acute crisis. Through this worked she honed her communication style to match her audience to clearly articulate their ideas and ensure the best care for those who could not advocate for themselves. Working in the non-profit world as a crisis clinician, sparked her interest in research and how to use data to instigate change and help others.

John M. Charles, MS
Senior Research Analyst

Summary of Qualifications	Mr. Charles is a meticulous data scientist who finds his greatest joy immersed in the world of research and thrives on unraveling the complexities of data. His expertise makes him the go-to person for intricate statistical queries and assignments demanding advanced analytical techniques. Trained in Six Sigma Methodologies, Mr. Charles boasts a wealth of knowledge and hands-on experience in parametric and non-parametric statistical analysis, statistical modeling, predictive analytics, machine learning, and big data analysis. His proficiency extends to cutting-edge data management and statistical analysis software, including SPSS, R, SAS, and more. While Mr. Charles is well-versed in supporting a broad spectrum of projects with simple analysis and report preparation, his true strengths shine in specialized work. Notably, for the Maine Shared Needs Health Assessment and Planning Process (SHNAPP), he conducted a comprehensive analysis of 161 health indicators at the state, county, and urban levels, providing valuable insights for decision-makers. For Unum, a leading disability insurer, Mr. Charles employed predictive modeling to identify drivers of consumer satisfaction, showcasing his ability to apply strategic data analysis. Utilizing data from the Virginia Youth Risk Behavior Survey, he skillfully segmented youth by peer crowds, uncovering groups with higher rates of risky behaviors and informing targeted interventions. In a groundbreaking effort, Mr. Charles explored the effects of implicit bias in the evaluation of judges in Massachusetts and Utah. Through regressions, he identified specific demographic groups of judges most susceptible to implicit bias, contributing valuable insights to foster fair and unbiased evaluations. Mr. Charles stands out not only for his technical proficiency but also for his dedication to making a positive impact through practical and insightful data analysis. His track record reflects a commitment to delivering actionable results that contribute to informed decision-making.
Education	MS Statistics, University of Southern Maine, Portland, Maine BA Mathematics, University of Southern Maine, Portland, Maine
Relevant Experience	**Complex Sampling and Data Weighting Methodologies** Mr. Charles has conducted wide-ranging research involving complex sampling and weighting methodologies. He is experienced in using propensity scoring adjustment for bias reduction in the comparison of data that include mixed records from probability (PS) and non-probability (NPS) samples. Under this approach, Mr. Charles fits statistical models to estimate the inclusion probability of the nonprobability units, and then use the predicted probabilities to derive the nonprobability sample weights. **Tobacco Control and Cessation Research**

Mr. Charles has conducted wide-ranging research on tobacco control and cessation. In 2019, he conducted analyses to evaluate the implementation of Tobacco 21 (T21) in both Massachusetts and Maryland among tobacco retailers. Following the passage of the state T21 law in Massachusetts, Mr. Charles measured retailer compliance with T21, the impact of T21 on retailer practices and illegal sales of tobacco to youth. He also used logistic regression models and decision trees to determine factors that are associated with T21 compliance rates in Massachusetts. His analyses showed that a pre-existing minimum legal sales age policy at the time of tobacco purchase had a statistically significant impact on sales rate among underage purchasers. In Maryland, Mr. Charles measured the degree of retailer awareness of, support, and perceived ability to comply with the state's T21 law.

Tobacco Use and Vaping Campaign Evaluations

Mr. Charles has extensive experience in conducting research to evaluate tobacco use and vaping cessation campaigns among youth and young adults. In 2020 and 2022, he worked with the Virginia Foundation for Healthy Youth (VFHY) to evaluate their "Hustle and Strive" and "Behind the Haze" media campaigns, which aim to reduce tobacco use and vaping among teens and young adults aged 13-21. Mr. Charles' analyses showed that in the first year of the campaign, a quarter of teens were aware of Hustle & Strive while about half were aware of Behind the Haze. Teens overwhelmingly liked the campaigns and find them relevant and meaningful. Many like the messaging about having a growth mindset and found the Hustle & Strive campaign motivating in helping to think about a substance-free lifestyle and better ways to deal with problems.

In an effort to prevent Maine's youth from using tobacco products and educate youth about the tactics used by Big Tobacco to target them, a collaboration between Maine Cancer Foundation (MCF), Maine Center for Disease Control and Prevention, and Rinck Advertising formed to develop "You Are the Target", a counter-marketing campaign that strategically intercepted youth via digital media platforms. Mr. Charles conducted research to collect and analyze data on the key performance indicators of the campaign, including campaign awareness, attitudes, and opinions of the dangers of tobacco use and messaging and tobacco use rates.

Market Segmentation Research

In 2019, Mr. Charles used cluster analysis to segment Aroma Joe's consumers based on lifestyle, preferences, food and beverages consumption, and demographic factors. His analyses showed that the coffeehouse consumers were comprised of five distinct clusters and allowed Aroma Joe's to better understand factors that influence consumers' purchase decisions.

In 2020, Mr. Charles conducted research to help MaineHealth understand more about the market for pediatric care in Southern Maine.

He used cluster analysis to identify five distinct consumer segments for pediatric care in the region, understand the values and drivers for each segment that influence the decision to choose (and stay) with a practice, identify which segments offer MaineHealth opportunities for growth, and how to better market and conduct outreach among specific segments of the market.

Academic Performance and Health Risk Behavior Analysis

Every two years since 2011, Buffalo Public Schools (BPS) has administered a risk behavior survey that includes questions from the United States Centers for Disease Control and Prevention (CDC) Youth Risk Behavior Surveillance (YRBS) survey. BPS also uses this opportunity to survey its students about other areas of interest to the district, including adverse childhood experiences (ACEs), mental health, dental health, risk perception, and exposure to traumatic events. In 2022, Mr. Charles conducted statistical analyses to explore possible links between health/wellness and academic performance. His analyses showed a clear link between self-reported academic data and health and risk behaviors. Students who reported better grades and expected to graduate and further their education were less likely to report mental health issues such as feeling sad or hopeless, and contemplating suicide. These students were also less likely to engage in risky behaviors – including substance use, sexual activity, weapon carrying, and physical fights – and more likely to feel good about themselves and the future and less likely to experience ACEs. At the school-level, schools with lower dropout rates and higher graduation rates also tended to see lower level of risky behaviors among their students.

Youth Peer Crowds and Health Risk Behavior Analysis

Every two years since 2016, the Virginia Foundation for Healthy Youth (VFHY) and the Rescue Agency combine data from the Virginia Youth Survey (VYS) and Rescue's Mindset Lens Survey *(IBase^{TM} Survey prior to 2021)* to conduct a comprehensive study of student health behaviors and peer crowd influences. The study segments students into five youth peer crowds: Hip Hop, Country, Alternative, Popular, and Mainstream. Mr. Charles used logistic regression models to examine the influence of peer crowds on health behaviors. After controlling for demographic differences between the crowds, results showed that risky behaviors were clustered in Alternative and Hip-Hop peer crowds. These groups reported significantly higher rates for tobacco, alcohol, and drug use; experiencing bullying; depression; suicidal behaviors; physical violence; and inactivity. The Popular and Country peer crowds exhibited moderate risk, while the Mainstream peer crowd was consistently at lowest risk. Study results were presented at the National Reduce Tobacco Use Conference and in a manuscript that has been submitted to the American Journal of Public Health for publication.

Race and Gender Bias Analysis

The Utah legislature established the Judicial Performance Evaluation

Committee to oversee the administration of the Utah Judicial Performance Evaluation Program. The program which includes surveys of attorneys, court staff, and jurors is used for retention of current court judges. Anecdotal evidence suggested that gender and race bias may exist in the survey component of these judicial evaluations. Mr. Charles used regression models to investigate potential bias against female judges as well as judges of color in survey data. His analyses showed some degree of bias in favor of white male judges in judicial ratings. Mr. Charles repeated similar analyses for the Massachusetts Judicial Performance Evaluation Program. His findings showed that minority and female trial court judges in Massachusetts were significantly more likely to be viewed negatively and as less capable than their white male counterparts.

Community Health Needs Assessments

The Maine Shared Health Needs Assessment and Planning Process (SHNAPP) is a shared community health improvement planning process for stakeholders across the state of Maine. This project involved both quantitative and qualitative data analysis of 161 health indicators for reporting at the state, county, and urban levels. Mr. Charles provided statistical analysis for this project. He also provided analytical support for the Community Health Needs Assessment Survey that was conducted by the Aroostook County Health Network (ACHN) in Maine. Mr. Charles used statistical analysis to provide data-based insights on topics related to healthcare quality and access in Aroostook County communities.

Consumer Satisfaction Surveys

Mr. Charles developed predictive analytics models for Unum's insurance satisfaction research, a Fortune 500 insurance company. The model used decision trees, allowing the client to identify important drivers of consumer satisfaction.

Additional Experience	Mr. Charles previously worked as a research assistant at the School of Business, University of Southern Maine. He conducted independent research on post-secondary students at risk of attrition. He also served as a tutor at the University of Southern Maine where he assisted students experiencing difficulties in mathematics and statistics.
Special Training	Certified Six Sigma Yellow Belt Certificate in Risk Management and Insurance, University of Southern Maine, Portland, Maine Certificate in Applied Statistics, University of Southern Maine, Portland, Maine
Publications	Jordan J, Stalgaitis C, Madden P, Charles J, Radhakrishnan A, Saggese D. *Results from the First Statewide Representative Study of Peer Crowd Influence and Adolescent Health Behaviors*. Health Education and Behavior 1-13. 2018. DOI: 10.1177/1090198118759148
Presentations	Assessing the Effectiveness of Using Propensity Scores to Target Hard

	to Reach Populations. (AAPOR 2023)

MARKET DECISIONS	**Katie Klinko** **Research Analyst**
Summary of Qualifications	Ms. Klinko has a strong analytical background in economics and international politics which allows her to bring a complex understanding of economic principles and political dynamics to the realm of public health and policy research. Although new to her position at Market Decisions Research, she has a proven history of producing high-quality research that addresses multifaceted socioeconomic issues. Her prior research projects focused on gender-based differences in U.S. labor market outcomes due to childcare constraints and the impact of the COVID-19 pandemic's restrictions on Maine's labor force. With skills including statistical modeling, data analysis, and economic forecasting, Katie is committed to delivering innovative solutions that advance public health policy initiatives. She communicates efficiently to enable productive collaboration and the seamless dissemination of research results. Her passion lies in combining the analytical with the personal to create meaningful insights and a positive impact.
Education	M.S. Economics, University of Maine B.S. Economics, The Pennsylvania State University B.A. International Politics, The Pennsylvania State University
Previous Experience	Graduate Research Assistant, University of Maine's School of Economics Undergraduate Assistant and Recitation Leader, The Pennsylvania State University's Department of Economics
Relevant Experience	**Maine Cancer Foundation (MCF) Patient Navigation Assessment 2023 – Phase 2** In Phase One of this project, Market Decisions Research (MDR) worked with the Maine Cancer Foundation (MCF) to conduct qualitative research with patient navigators across the state of Maine. These focus groups and in-depth interviews provided information on where navigators are located within the state and how to best gather information from them. In Phase Two, MDR designed a survey to find out more about the barriers navigators and their patients face throughout Maine. Ms. Klinko worked on this project as a Research Analyst and was responsible for creating and revising the client deliverable report. **Rinck Maine Youth Tobacco Survey 2023** The Rinck Maine Youth Tobacco Survey was designed at Market Decisions Research (MDR) by the request of Rinck Advertising and the Maine Center for Disease Control and Prevention (Maine CDC). Its purpose was to explore the target demographic's perceptions about tobacco usage and contribute valuable insights to inform future public health initiatives and campaigns. Ms. Klinko worked on this project as a Research Analyst and was responsible for creating and revising the client deliverable report.

Additional Experience	Ms. Klinko previously worked as a graduate research assistant in the Maine Regional Economic Modeling Lab through the School of Economics at the University of Maine. As a research assistant, she was responsible for all aspects of the research process from project design and analytical methodology to data programming and economic model adjustments. She successfully presented and defended her academic research regarding U.S. labor market dynamics to a board of university advisors and local community members in July 2022. In addition, she worked with university administration and fellow students to reboot the Women in Economics student organization on campus to foster a supportive community for underrepresented demographics within the field of economics.
Special Training	STATA, R/RStudio, Tableau
Presentations	*Analysis of U.S. labor market matching efficiencies and new hires rates by gender and state*. Mary K. Klinko, MS. Presented at the University of Maine Graduate Thesis Defense for Master of Science in Economics, July 2022.